AGent
CAT Administration
Version 3.3

User Guide

auto-graphics, inc.

a-g canada ltd.

EFFECTIVE DATE FOR THIS DOCUMENT:

Version 3.3   23 MARCH 2009

REVISION HISTORY:

Version 3.2   20 OCTOBER 2008
Version 3.1 Rev A   10 JUNE 2008
Version 3.1   31 MARCH 2008
Version 3.0 Rev A   02 JANUARY 2008
Version 3.0   03 AUGUST 2007
Version 2.6   21 NOVEMBER 2006
Version 2.4   20 DECEMBER 2005
Version 2.3   25 MAY 2005
Version 2.2   03 DECEMBER 2004
Version 2.1   11 MAY 2004
Version 2.0   08 DECEMBER 2003
Version 1.8   26 MAY 2003
Version 1.6   26 NOVEMBER 2002
Initial Issue   26 SEPTEMBER 2001

CAT Administration User Guide

TABLE OF CONTENTS

THIS PAGE INTENTIONALLY LEFT BLANK

INTRODUCTION

This User Guide is designed to provide a working understanding of the features and functions of AGent CAT Administration.

Overview

CAT Administration is an online application that provides administrative control over your library's holdings within a union database. Using CAT Administration, you can:

- Add, modify and delete locations for your library

- Download records from any available bibliographic database for local use.

When logged into CAT Administration, appropriate links are provided on Title Lists and Full Record Displays (for bibliographic databases) to facilitate locations maintenance and MARC record download.

The Web Interface

The CAT Administration web interface is designed to provide a logical and efficient means of performing administrative functions. The screens are structured to assist workflow, and contain navigational links and "expandable" menus to provide "single-click" access to administrative features and functions.

The Toolbar

The Toolbar is shown on Term Lists, Cross Reference Lists, Title Lists and Full Record Displays in the AGent Search Interface. By default, the Toolbar contains a series of "text-based" buttons used to navigate the Search Interface, and to access system features and functions. Alternately, you can use the **My Preferences** feature to replace the "text-based" Toolbar with an "icon-based" Toolbar (refer to the *AGent User Guide* for details). The following table describes the features and functions that can be accessed via the Toolbar.

> Depending on your login mode and specific staff privileges, and the type of screen you are currently viewing, some buttons may not be available.

Button		Function
Text	**Icon**	
Title List		Returns to the previous Title List.
Blank Request		Displays the Blank ILL Request Form.
		This function is available with ILL Administration *only*.
Request This Item		Displays the ILL Request Form for the currently active Full Record Display.
		This function is available with ILL Administration *only*.
Translate		This function is not currently implemented.
Authorize		Matches/validates applicable headings in a currently displayed bibliographic record against headings in an authority record, according to your Authority Control hierarchy.
		This function is available with Agent Authority Control *only*.

Button		Function
Text	**Icon**	
Add to Cart		When used from a Title List, adds the *selected* records to your "shopping cart" (Download Cart) for subsequent download to a local workstation. When used from a Full Record Display, adds the *currently displayed* record to your "shopping cart" (Download Cart) for subsequent download to a local workstation (see ***Adding Records to the Download Cart*** on page **3-2** for details).
		This function is available with CAT Administration *only*.
View Cart		Displays the contents of your "shopping cart" (Download Cart) (see ***Managing the Download Cart*** on page **3-4** for details).
		This function is available with CAT Administration *only*.
Add to Bibliography		Adds brief bibliographic data to your Bibliography.
		This function is available only if your library has enabled authorization.
View Bibliography		Displays the contents of your Bibliography. Saved records can then be viewed, printed, or downloaded in one of several formats.
		This function is available only if your library has enabled authorization.
Add to Merge List		When used from a Title List, adds the *selected* records to your Merge List for subsequent merging and deduplication. When used from a Full Record Display, adds the *currently displayed* record to your Merge List for subsequent merging and deduplication.
		This function is available with UDMM Administration *only*.
View Merge List		Displays the contents of your Merge List.
		This function is available with UDMM Administration *only*.
Print		Displays a "printer-friendly" version of the current Term List, Cross-Reference List, Number List, Title List or Full Record Display in a "popup" window for subsequent printing.
Help		Displays AGent's online context-sensitive Help file.

The Cataloging Menu

The **Cataloging** menu is shown on *all* Full Record Displays. The menu provides access to all features and functions available with CAT Administration.

To use the Cataloging menu:

- Click the ⊞ icon to *expand* the **CAT Options** menu and display the available features and functions.

- Click the ⊟ icon to *collapse* the **CAT Options** menu.
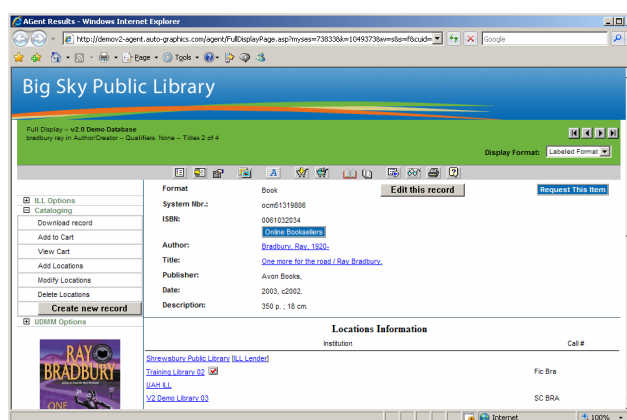
Cataloging Menu

- Features and functions available through the **Cataloging** menu are described below:

  ○ **Download Record -** Lets you download the currently displayed record, in MARC 21 format, to a local workstation (see ***Downloading Single Records*** on page **3-1** for details).

  ○ **Add to Cart -** Adds the currently displayed record to your "shopping cart" (Download Cart) for subsequent download to a local workstation (see ***Adding Records to the Download Cart*** on page **3-2** for details).

  ○ **View Cart -** Displays the contents of your "shopping cart" (Download Cart) (see ***Managing the Download Cart*** on page **3-4** for details).

  ○ **Add Locations -** Lets you add a location to the currently displayed record (see ***Adding a Location*** on page **2-2** for details).

  ○ **Modify Locations -** Lets you modify existing locations for the currently displayed record (see ***Modifying Locations*** on page **2-3** for details).

  ○ **Delete Locations -** Lets you delete existing locations from the currently displayed record (see ***Deleting Locations*** on page **2-4** for details).

  ○ **Create new record-** Launches the AGCat client to allow for creation of a *new* bibliographic record (see the ***AGent AGCat Client User Guide*** for more information).

The CAT Administration Menu

The **CAT Administration** menu provides access to features and functions related to administration of cataloging activities for your library.

To access the CAT Administration menu:

1. Click the **Staff Menu** button on *any* screen in the AGent Search interface.

   - The Staff Menu screen displays.

2. Click the **CAT Admin** button to display the **CAT Administration** menu.
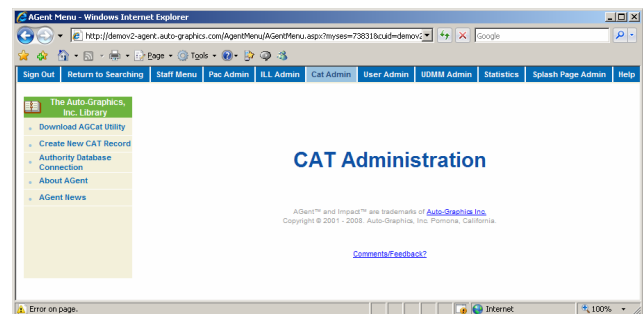
CAT Administration Menu

If CAT Administration is your *default* login mode, the CAT Administration "Welcome" screen displays *automatically* when you select **Staff Menu** from the AGent Search interface (refer to the *AGent User Guide* for information on configuring your default login mode).

3. The **CAT Administration** menu provides access to the following options:

   - **Download AGCat Utility** - Downloads the *optional* AGCat Client for use on your local workstation (see ***About AGCat*** on page **4** for details).

   - **Create New CAT Record** - Displays the Create New Cataloging record screen, from which you can launch the AGCat client to allow for creation of a *new* bibliographic record (see the ***AGent AGCat Client User Guide*** for more information).

   - **Authority Database Connection** - Allows you to specify the parameters for connection to the desired authority database (see the ***AGent Authority/Translate User Guide*** for more information).

   - **About AGent** - Displays the "About AGent" screen.

   - **AGent News** - Displays the AGent "News" page.

4. Click the **Return to Searching** button to return to the AGent Search interface.

Organization of the User Guide

This User Guide is designed to provide an overview of the features and functions of AGent CAT Administration, and includes the detailed procedures to maintain locations for your library within the union catalog. The User Guide is divided into three chapters, as follows:

Chapter 1 – Getting Started. This chapter explains how to prepare to use CAT Administration. The chapter includes hardware/software requirements, system availability, and system Login and Logoff.

Chapter 2 – Managing Locations. This chapter provides the procedures to add, modify and delete locations for your library.

Chapter 3 – Downloading Records. This chapter provides the procedures to download records from the union database to your computer for local use.

Optional Features

AGent is modular in design, and offers libraries a high degree of flexibility in configuring the system to suit the specific needs of their patrons and staff members. The "basic" AGent search module can be enhanced by adding staff-level functionality to support User Administration and user authentication, PAC Administration, Cataloging, Union Database Management, Statistics and/or ILL Administration. Additionally, a number of *optional* features and functions are available within each AGent module.

This manual provides instructions covering *all* features and functions available through AGent CAT Administration. Depending on the *specific* configuration of AGent for *your* library, some features and functions may not be available to you. For information on enabling optional features and functions for your library, contact Auto-Graphics Sales and Marketing.

About AGCat

The AGCat Cataloging Client is an *optional* Windows™ based utility designed for use with Auto-Graphics' AGent system. AGCat provides the means for copying, creating, editing and deleting MARC records within an *AGImpact* database.

The AGCat Client is invoked from within AGent by clicking the **Edit This Record** button on *any* Full Record Display.

Refer to the *AGent AGCat Client User Guide* for information on the features and functions available with the AGCat Client.

For information on obtaining and enabling this *optional* feature for your library or consortium, contact Auto-Graphics Sales and Marketing.
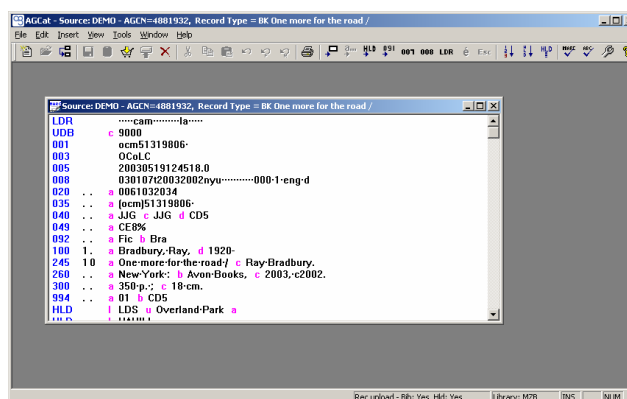
AGCat Cataloging Client

Chapter 1. GETTING STARTED

This chapter identifies the hardware and software necessary to access and operate AGent CAT Administration, where to get help, and procedures for system Login and Logoff.

Hardware/Software Requirements

AGent can be accessed by a Web-capable PC (486 minimum) or Macintosh using a conventional Internet account and a Java-enabled Web browser such as Microsoft Internet Explorer (version 5.5 *minimum*), Netscape (version 6.2 *minimum*), or Firefox (version 1.0.7 *minimum*). No stringent hardware requirements are necessary to support AGent. CAT Administration is available through appropriate Staff Login to AGent (see *Logging In* on page **1-1** for details).

System Availability

CAT Administration is available, via AGent, 24 hours daily.

Getting Help

If you need help using CAT Administration, contact Auto-Graphics' Help Desk by one of the following means:

voice: (800) 852-8686 5am ~ 5pm Pacific Time

email: HelpDesk@auto-graphics.com

fax: (909) 595-5190

Before calling the Help Desk, consider referencing one of the following sources of information:

- **Online Help**. CAT Administration's HTML-based Help displays in a separate browser window that you can view concurrently with your online session.

- The **[News]** button that displays on CAT Administration screens is intended to be a source for helpful information and documentation. From this link you can view the latest Release Bulletins, Product Information Bulletins, User Guides and News Items.

Configuring Your Browser for AGent

When a browser is installed on your workstation, it is configured with a *default* set of preferences. Some of these preferences must be modified to configure the browser for use with AGent. You must verify the browser is properly configured to ensure full access to all features and functions available through AGent. Refer to *Product Information Bulletin AGent-009, Configuration Recommendations for Browsers and Firewalls* for more information.

Configuring Your Popup Blocker

AGent uses "popup" windows to display search results, "Help" files and other information screens. "Popup" blockers may prevent the display of these screens. In order to access all features and functions available through AGent, you must configure your popup blocker for operation with AGent. Refer to *Product Information Bulletin AGent -010, Using AGent with 'Popup' Blockers* for more information.
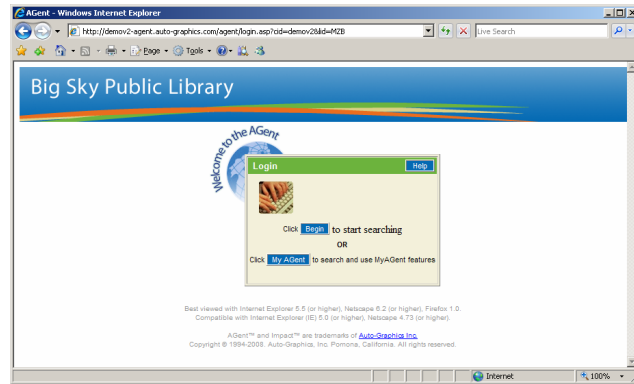
Logging In

Staff access to AGent is password-protected. You *must* provide a valid **Username or Barcode** and **Password or PIN** to log into AGent with staff privileges.

Some workstations *within your library* may be configured to provide "generic" patron access to AGent based on the IP address of the workstation. If your library utilizes "IP authentication" for "generic" patron login, and your workstation falls within the specified IP range, the "IP Authenticated" screen displays when you first access AGent. Click the **My AGent** button to display the Login screen (click the **Begin** button to access AGent as a "generic" patron).

"IP Authenticated" Screen

If your library has enabled the *optional* "Suppress 'My AGent' Login" feature, the **My AGent** button *is not* shown on the "IP Authenticated" login screen. You *cannot* perform an authenticated login to AGent from this workstation.

Some AGent systems may be configured to provide authentication via a "cookie" saved to your workstation. If you wish to save a "cookie" containing your login information to your workstation for future logins, select the **Remember me** checkbox on the login screen, then submit your login request.

- A *checkmark* ☑ indicates a "cookie" *will* be saved to your workstation.
- An *empty checkbox* ☐ indicates a "cookie" *will not* be saved to your workstation.
- Clicking the checkbox will toggle it on and off.

If your workstation is used by *more than one* person, to prevent unauthorized access to AGent staff features and functions, it is recommended that you *do not* save your login information to a "cookie."

Once your login information has been saved to a "cookie" on your workstation, the Authenticated User Login screen will display each time you access AGent. Click the **Begin** button to login using the saved login data.

If you choose to login as a *different* user, the "cookie" containing your current login data will be *overwritten* with the new login data.

To login to AGent:

1. On the Login screen, enter your library name in the **Library** text box, as necessary.

   - By default, the system will prefill the library name for your library.

   If desired, you may use the **Lookup** feature to locate the code for the library to which you wish to login (see *Using Library Code Lookup* on page **1-4** for details).
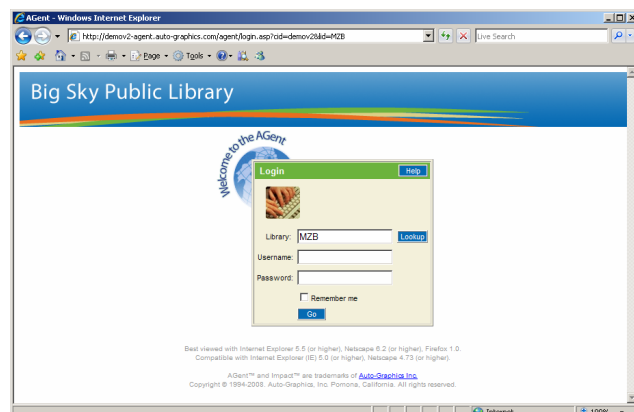
"IP Authenticated" Login Screen

2. Enter your user name in the **Username or Barcode** text box.

**3.** Enter your password in the **Password or PIN** text box.

- Your password will display on the screen as a series of asterisks.

> In some cases, libraries may assign the default password "USERPASS" or "STAFFPASS" when creating an account for a new user (library patron or staff member). When you log into AGent for the *first time* using the default password "USERPASS" or 'STAFFPASS", you are prompted to provide a *permanent password* to complete the login process (see *Entering Your Permanent Password* on page **1-5** for details).

> On systems configured with the *optional* multiple-language display feature, the **Select your Language** menu is used *only* for "guest" logins to AGent. You can use the **My Preferences** function to set the desired *default* display language for your account (see the *AGent User Guide* for details).

**4.** Click the **Go** button to submit your Login request.

- If your library provides access to third-party databases that require cookies for authentication, and your browser's Privacy/Security settings are not sufficient to accept cookies from third-party databases, an advisory "Cookie Settings" message displays.

  ○ If you wish to ensure access to third-party databases that require cookies for authentication, adjust your browser's Privacy/Security settings, as needed (see the *AGent User Guide* for details), then click the **Continue** link to complete your login.

Cookie Settings Message

  ○ If you *do not* wish to change your browser's Privacy/Security settings, click the **Continue** link to complete your login.
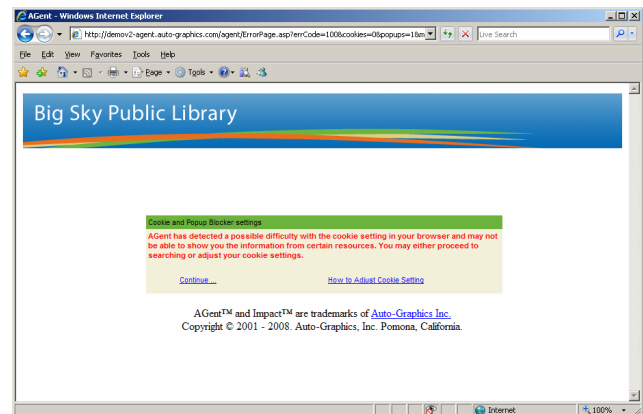
  > If you choose *not* to adjust your browser's Privacy/Security settings, searches of *any* databases utilizing "cookie authentication" will fail.

- If your Login request is *unsuccessful*:

  ○ If you enter an *invalid* **Username or Barcode**, the message "Invalid account entered. Please see your librarian." displays. Click the **Continue** button to login to AGent as a "guest", or click the **Try Again** button to return to the staff login screen. Check the **Library** name, **Username or Barcode** and **Password or PIN**. Make any necessary corrections, then click the **Go** button to resubmit the form.
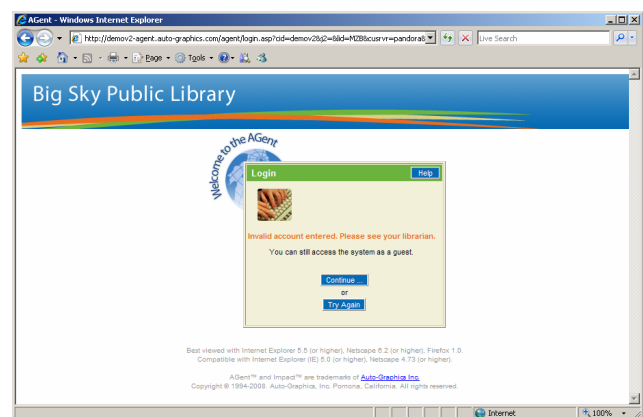
"Invalid Account Entered" Screen

○ If you enter an *invalid* **Password or PIN** with a *valid* **Username or Barcode**, the message "Invalid Password Entered" displays. Click the **Email my reminder question** link to receive an email copy of your password reminder question and return to the staff login screen. Make any necessary corrections to the **Library** name, **Username or Barcode** and **Password or PIN**, then click the **Go** button to resubmit the form.
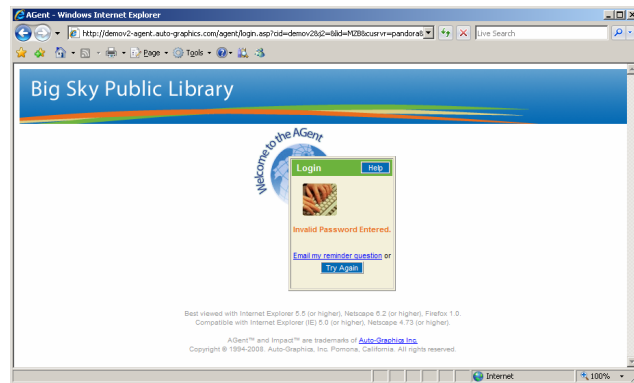
"Invalid Password Entered" Screen

> If an email address *is not* included in your user profile, or if you do not wish to receive an mail copy of your password reminder message, click the **Try Again** button to return to the staff login screen. Check the **Library** name, **Username or Barcode** and **Password or PIN**. Make any necessary corrections, then click the **Go** button to resubmit the form.

- If your Staff Login request is *successful*:

    ○ AGent enters the *default* staff mode for your user account.

    ○ Appropriate links and buttons are added to Title Lists and Full Record Displays throughout AGent.

Using Library Code Lookup

If you are not sure of the **Library** code for your library, or if you wish to login to a *different* library, you can use the library code **Lookup** feature to locate the desired library code.

To use Library Code Lookup:

1. Click the **Lookup** button on the Login screen.

    - The Library Code Lookup screen displays in an *additional* browser window. This list shows the **Library Code** and **Library Name** for *all* libraries in your consortium or collective.

    - Click the **Sort by Library Code** button to sort the list alphabetically by **Library Code**.

    - Click the **Sort by Library Name** button to sort the list alphabetically by library name.

2. Click the **Library Code** for the library to which you wish to login.
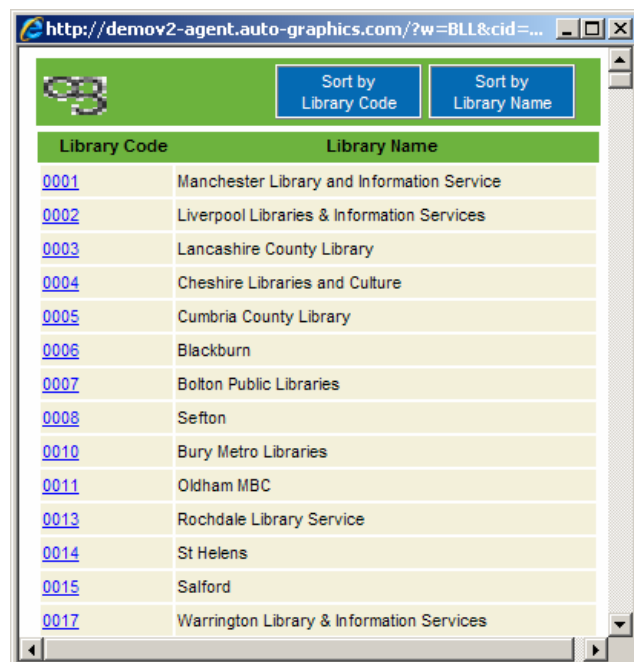

Library Code Lookup Screen

- The Library Code Lookup screen closes, and the selected library code is entered in the **Library** text box on the Login screen *automatically*.

Entering Your Permanent Password

When you log into AGent for the *first time* using the default password "USERPASS" or "STAFFPASS", the Permanent Password screen displays.

> You *must* provide a permanent password to complete the login process. Select a password that you will remember. Your password may be a *maximum* of 20 characters in length, with *no spaces*. Your password may have *any combination* of alphabetic and numeric characters, and the underscore "_" character. Your password *is not* case-sensitive.
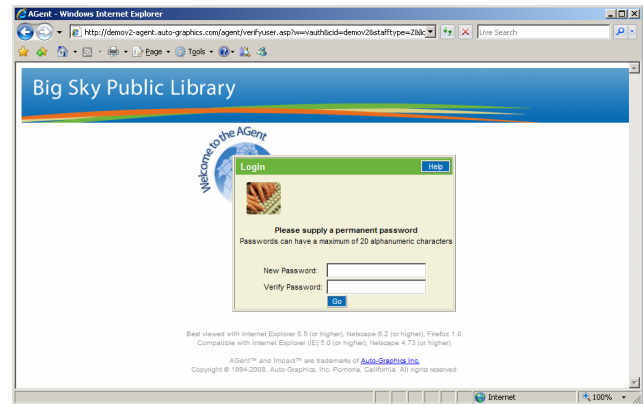
Permanent Password Screen

To enter your permanent password:

1. Enter the password you have chosen in the **New Password** and **Verify Password** text boxes.

> Enter the password in *exactly* the same way in *both* text boxes.

2. Click the **Go** button to save your permanent password and complete the login process.

- If you enter an invalid password, an error dialog displays the message "Passwords do not match."

  ○ Make sure there are *no spaces* in your password.

  ○ Make sure you enter your password in *exactly* the same way in both the **New Password** and **Verify Password** text boxes.

- Re-enter your password in the **New Password** and **Verify Password** text boxes, then click the **Go** button.

> REMEMBER TO KEEP YOUR PASSWORD SECURE. **DO NOT** tell your personal password to anyone. **DO NOT** write your password down. You will use your new password for all future logins, so remember it! If you think your password may be compromised, you can change it at any time using the **My Account** feature (see the *AGent User Guide* for details). If you forget your password, notify your Library or System Administrator.

Logging In from the Splash Page

If your library has enabled the *optional* Splash Page feature, your library's Splash Page displays when you access the system.

To login from the Splash Page:

1. Click the **Account Login** button on the Splash Page.

   - The Account Login screen displays.

2. Enter your user name in the **Username** text box.

3. Enter your password in the **Password or PIN** text box.

   - Your password will display on the screen as a series of asterisks.

4. Click the **Login** button to submit your Login request.
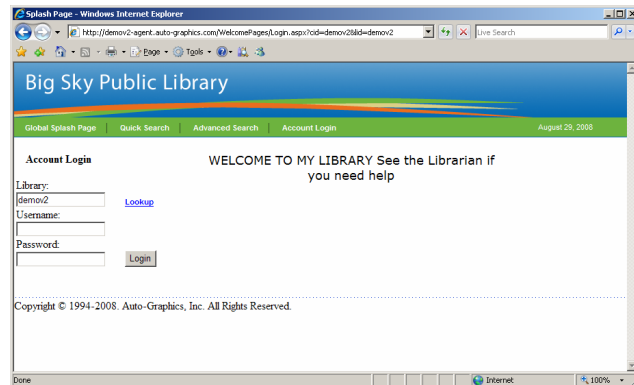
Account Login Screen

Logging Off

To prevent unauthorized access to staff features and functions, you must exit CAT Administration *and* log off from AGent.

To exit CAT Administration:

- Click the **Sign Out** button on *any* AGent screen.
  - The AGent Login screen displays.

Chapter 2. MANAGING LOCATIONS

AGent's CAT Administration module lets you add, modify or delete locations within your library's Union database using forms based on the default locations record for your library.

> Your library's location content profile *must* be defined to reflect the format of your consortium's HLD field *before* you can properly use AGent's cataloging features. Contact Auto-Graphics Technical Services if changes to your library's default location content profile are necessary.

Every change you make to locations records is reflected in the **LOCATIONS INFORMATION** section of the associated Full Record Display *immediately* following submission.

This chapter provides the procedures to:

- Add a location using the default locations record

- Edit locations data

- Delete one or more locations

Managing Locations for Multiple Libraries

By default, you can manage locations for your library *only*. However, some libraries may be configured to manage locations for *multiple* libraries within a consortium or collective.

If your library is configured to manage locations for *multiple* libraries, the Locations Maintenance screen displays in an *additional* browser window when you select a locations maintenance function from the **CAT Options** menu (see *The Cataloging Menu* on page **2** for details). You must select the desired library for which you wish to perform the selected function.

To select a library for locations maintenance:

- The Locations Maintenance screen shows a listing of library codes for *all* libraries for which you can manage locations.

- Select the library for which you wish to perform locations maintenance from the list box, then click the **Submit** button to continue with the selected add (see *Adding a Location* on page **2-2** for details), modify (see *Modifying Locations* on page **2-3** for details) or delete (see *Deleting Locations* on page **2-4** for details) operation.
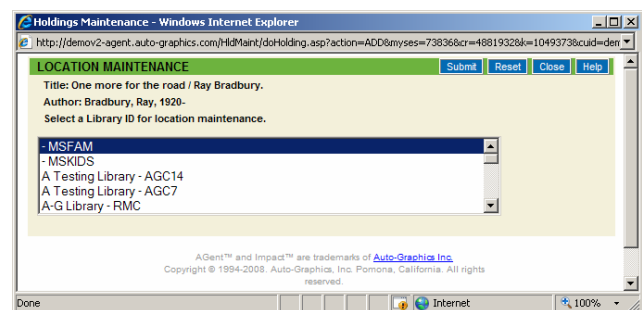
Locations Maintenance Screen
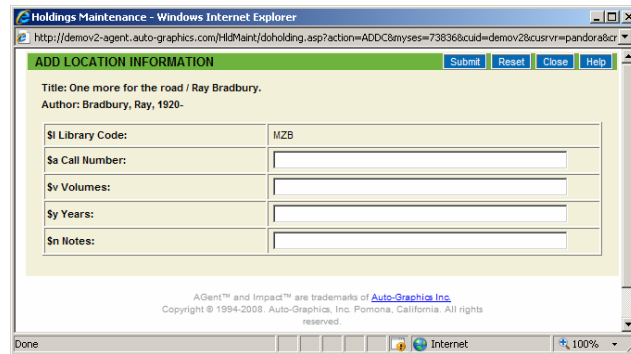
Adding a Location

You can add locations for the currently displayed record.

To add a location:

1. Access the Full Record Display for the title to which you wish to add a location in your library's Union database. (Refer to the *AGent User Guide* for details.)

2. Select **Add Locations** from the **Cataloging** menu (see *The Cataloging Menu* on page 2 for details).
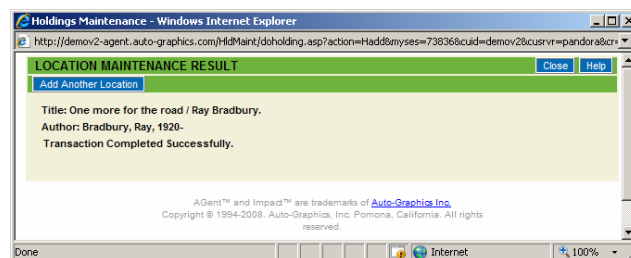
> If your library is configured to manage locations for *multiple* libraries, select the library for which you wish to perform locations maintenance (see *Managing Locations for Multiple Libraries* on page **2-1** for details).

- The Add Location Information screen displays in an *additional* browser window.

3. Enter the appropriate call number information in the **$a Call Number** text box.

4. If necessary, enter the appropriate information in any other text box(es) on the form.

5. Click the **Submit** button to submit the location addition.

Add Location Information Screen

- The message "Transaction Completed Successfully" displays.

6. Click the **Add Another Location** button to add another location for the current title, or click the **Close** button to close the Transaction message screen and return to the previous Full Record Display.

> If you add a location using a call number that already exists in the database *for your library* (or the *currently selected library* when managing locations for multiple libraries), the message "This location already exists in the database" displays. Click the **Add Another Location** button to return to the Add Location Information screen and enter a *unique* call number, or click the **Close** button to cancel the addition and return to the previous Full record Display.

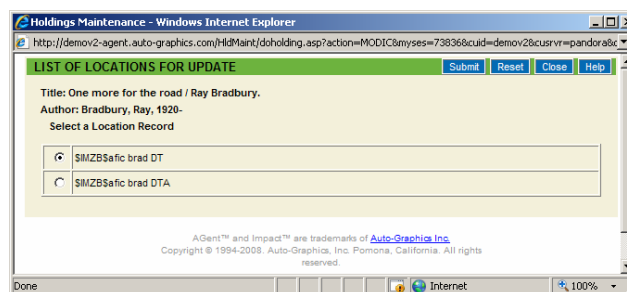**Add Transaction Message Screen**

Modifying Locations

You can change locations for the currently displayed record.
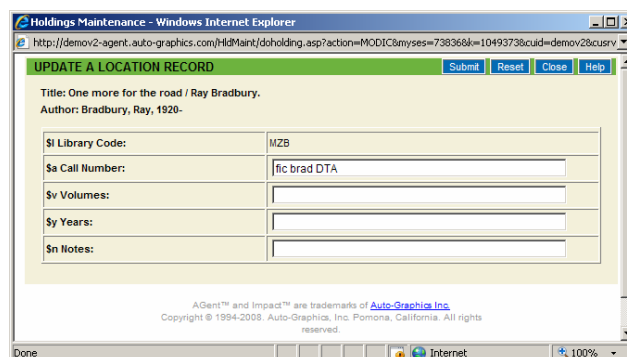
To modify a location:

1. Access the Full Record Display for the title for which you wish to modify a location in your library's Union database. (Refer to the *AGent User Guide* for details.)

2. Select **Modify Locations** from the **Cataloging** menu (see *The Cataloging Menu* on page 2 for details).

> If your library is configured to manage locations for *multiple* libraries, select the library for which you wish to perform locations maintenance (see *Managing Locations for Multiple Libraries* on page **2-1** for details).
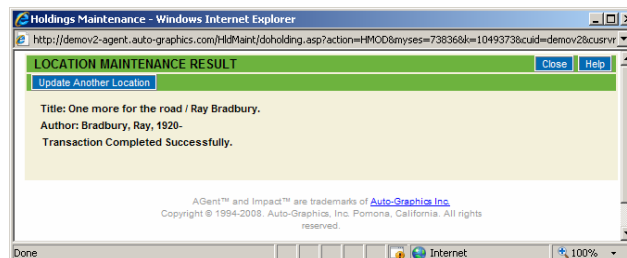
- If *multiple* locations for your library are attached to the record:

    ○ The List of Locations for Update screen displays in an *additional* browser window.

    ○ Select the radio button for the location record you wish to modify, then click the **Submit** button. The Update a Location Record screen displays.

- If a *single* location for your library is attached to the record:

    ○ The Update a Location Record screen displays in an *additional* browser window.

3. Add, change or delete information from any text box(es) on the form.

4. Click the **Submit** button to submit the change to the location record.

    - The message "Transaction Completed Successfully" displays.

5. If *additional* locations for the library are attached to the record, click the **Update Another Location** button to return to the List of Locations for Update screen, or click the **Close** button to close the Transaction message screen and return to the previous Full Record Display.

List of Locations for Update Screen

Update a Location Record Screen

Modify Transaction Message Screen

Deleting Locations

You can delete locations for the currently displayed record.
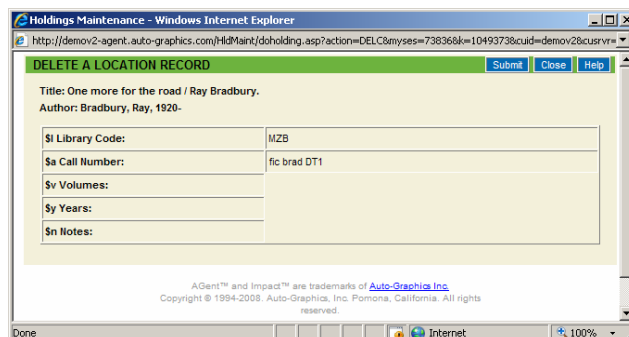
To delete a location:

1. Access the Full Record Display for the title from which you wish to delete a location in your library's Union database. (Refer to the *AGent User Guide* for details.)

2. Select **Delete Locations** from the **Cataloging** menu (see *The Cataloging Menu* on page 2 for details).

> If your library is configured to manage locations for *multiple* libraries, select the library for which you wish to perform locations maintenance (see *Managing Locations for Multiple Libraries* on page **2-1** for details).

- If *multiple* locations for your library are attached to the record:

  ○ The List of Locations for Delete screen displays in an *additional* browser window.

  ○ Select the radio button for the location record you wish to delete, then click the **Submit** button. The Delete a Location Record screen displays.

- If a *single* location for your library is attached to the record:

  ○ The Delete a Location Record screen displays in an *additional* browser window.

3. Click the **Submit** button to submit the location deletion.

  - The message "Transaction Completed Successfully" displays.

4. If *additional* locations for your library are attached to the record, click the **Delete Another Location** button to return to the List of Locations for Delete screen (if *multiple* locations are attached) or the Delete a Location Record screen (if a *single* location is attached), or click the **Close** button to close the Transaction message screen and return to the previous Full Record Display.
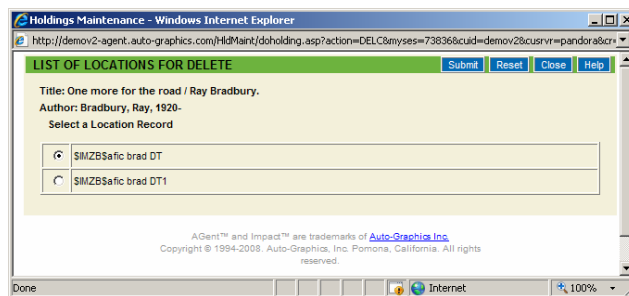
List of Locations for Delete Screen

Delete a Location Record Screen
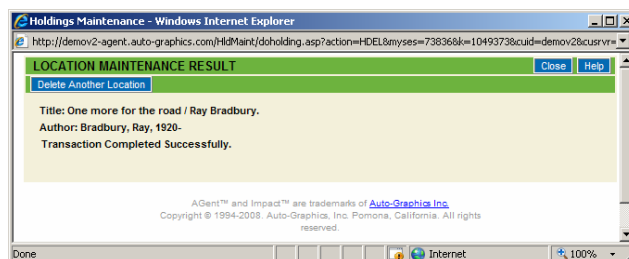
Delete Transaction Message Screen

Chapter 3. DOWNLOADING RECORDS

CAT Administration allows you to download bibliographic records, in MARC 21 format, to a file on a local computer. Downloaded records can be imported into local circulation systems or card labeling systems. You may download records from *any database* to which your library has access. CAT Administration allows you to download a *single* MARC record, or to save *multiple* MARC records to a download cart for *simultaneous* download.

> To ensure downloaded records are saved with the proper **.mrc** extension, the **.mrc** file type must be defined for your workstation. Refer to the Microsoft Windows documentation for the procedures for creating file types.

Setting Download Cart Options

CAT Administration incorporates two *distinct* download cart options; **My Cart** and **My Library Cart**.

- **My Cart** - This option allows a CAT staff member to save records for download to a *unique* cart associated with their *user name*. Other CAT staff members *cannot* add records to this list.

- **Library Cart** - This option allows *multiple* CAT staff members to add records for download to a *common* cart associated with *their library*.

The **My Cart** option is selected by *default* for new CAT Administration users. You can use the **Download Cart Type** option on the **My Preferences** screen to switch between cart types (see the *AGent User Guide for details*).

Downloading Single Records

To download a record:

1. Access the Full Record Display for the record you wish to download. (Refer to the *AGent User Guide for details*.)

2. Display the **Cataloging** menu by clicking the associated ⊞ button.

3. Select **Download record** from the **Cataloging** menu (see *The Cataloging Menu* on page 2 for details).

    - A File Download dialog displays.

4. Click the **Save** button on the File Download dialog.
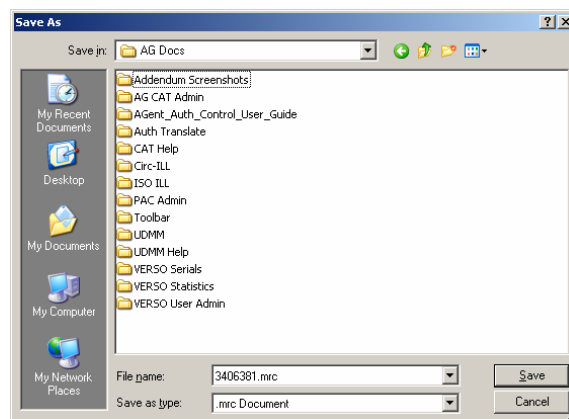
    - A standard Save As dialog displays.

5. Enter a name for the file in the **File name** text box.

> Be sure to use the **.mrc** extension at the end of the file name.

6. Select the location in which you wish to save the record.

7. Click the **Save** button to download the record.

Save As Dialog

    - Depending on your browser, a status dialog may display while the record is being downloaded. When the record has been downloaded, a "Download Complete" message displays. Click the **Close** button to close the status dialog.

Downloading Multiple Records

You may save *multiple* records to a download cart and simultaneously download the records in *single* file.

Adding Records to the Download Cart

Records may be added to the Download Cart from either a Title List or from a Full Record Display. Additionally, records added to the list may be subsequently deleted from the list if you determine you no longer wish to download the record(s).

To add records from the CBB display:

1. Access the CBB display from which you wish to select records. (Refer to the *AGent User Guide* for details).

2. Use the checkboxes to the left of each title in the brief browse lists to select the records you wish to add (from the current page of the brief browse list) to your download cart.

- A *checkmark* ☑ indicates the associated record *is* selected.

- An *empty checkbox* ☐ indicates the associated record *is not* selected.

- Clicking a checkbox repeatedly will toggle it on and off.

3. Click the **Add to Cart** button in the brief browse list Toolbar (or the 🛒 button for Icon Toolbars) to add the selected records to your Download Cart.
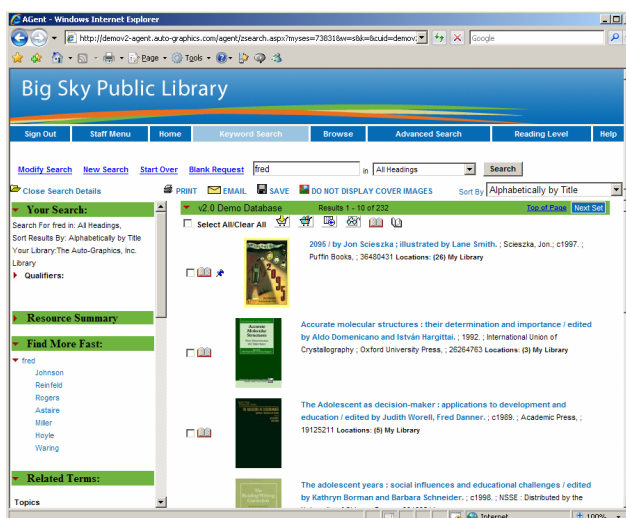
"IP Authenticated" Login Screen

A separate Toolbar is provided for *each* brief browse list shown on the CBB display.
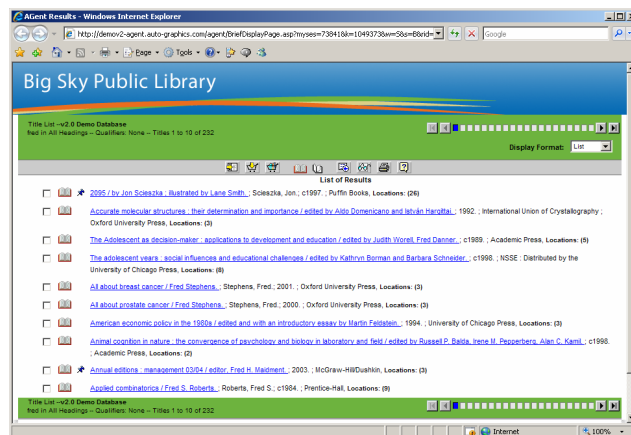
- The screen refreshes with a 🛒 icon shown following the title of each record added to the Download Cart.

When adding records to your Download Cart from the CBB display, you *must* add the records on a *page-by-page* basis for *each* brief browse list. If you select records from a given page of a brief browse list, then view *another* page of the list (or perform a new search) *before* adding the current selections to your Download Cart, the current selections *will not* be retained.

4. Repeat steps **2** and **3** to add *additional* records from other pages of the current brief browse list (or from other brief browse lists) to the Download Cart.

5. Perform additional searches, as desired, to add *additional* records to the Download Cart.

To add records from a Title List:

1. Access the Title List from which you wish to select records. (Refer to the *AGent User Guide* for details.)

2. Use the checkboxes on the left-hand side of the screen to select the records you wish to add (from the current page of the Title List) to your download cart.

- A *checkmark* ☑ indicates the associated record *is* selected.

- An *empty checkbox* ☐ indicates the associated record *is not* selected.

- Clicking a checkbox repeatedly will toggle it on and off.

Typical Title List

3. Click the **Add to Cart** button in the Toolbar (or the 🛒 button for Icon Toolbars) to add the selected records to your Download Cart.

- The screen refreshes with a 🛒 icon shown following the title of each record added to the Download Cart.

> When adding records to your Download Cart from a Title List, you *must* add the records on a *page-by-page* basis. If you select records from a given page of a Title List, then view *another* page of the Title List (or perform a new search) *before* adding the current selections to your Download Cart, the current selections *will not* be retained.

4. Repeat steps **2** and **3** to add *additional* records from other pages of the current Title List to the Download Cart.

5. Perform additional searches, as desired, to add *additional* records to the Download Cart.

To add a record from a Full Record Display:

1. Access the Full Record Display for the record you wish to download. (Refer to the *AGent User Guide* for details.)

2. Select **Add to Cart** from the **Cataloging** menu (see *The Cataloging Menu* on page 2 for details), *or*, click the **Add to Cart** button in the Toolbar (or the 🛒 button for Icon Toolbars) to add the record to your Download Cart.

- The screen refreshes with a 🛒 icon shown in the upper right-hand corner, indicating the record has been added to the Download Cart.

3. Perform additional searches, as desired, to add *additional* records to the Download Cart.

Managing the Download Cart

You can view the Download Cart and delete any unwanted records *prior to* downloading the MARC records file.

To display the Download Cart:

1. View the current contents of your download cart using any of the following methods:

   - Click the **View My Cart** or **View My Library Cart** link, as applicable, from *any* AGent search screen.

   - Select **View Cart** from the **Cataloging** menu.

   - Click the **View Cart** button in the Toolbar (or the 🛒 button for Icon Toolbars).

     ○ The Download Cart displays in an *additional* browser window. Records shown in the Download Cart are listed in the order in which they were added to the cart.
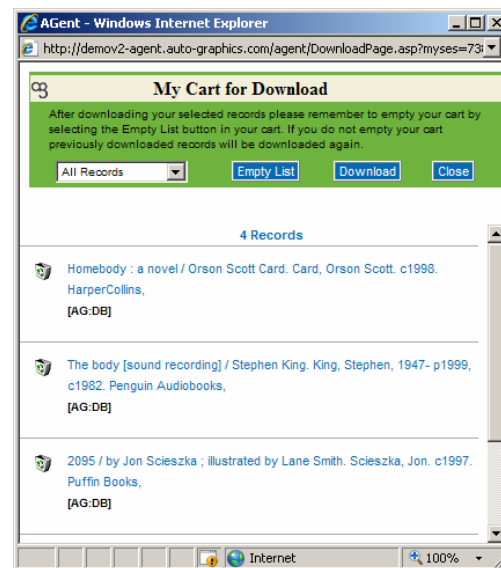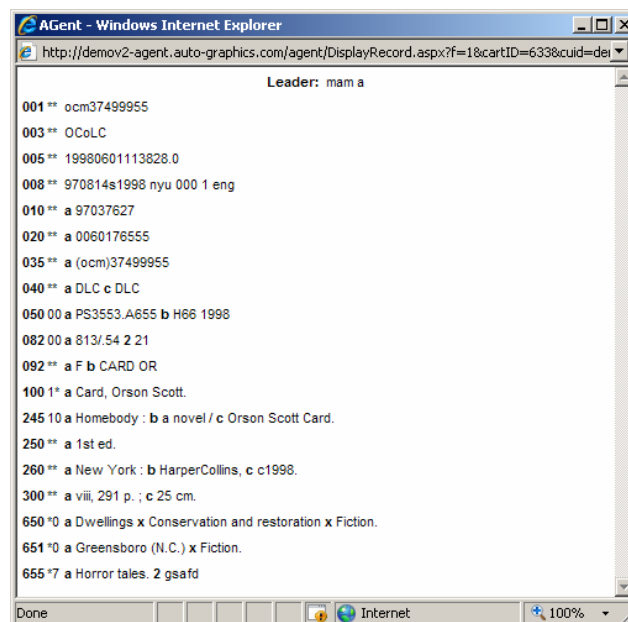
Typical Download Cart

When the Download Cart is opened, AGent must process the currently selected records in preparation for downloading. The message "Please Wait.. while cart is downloading." displays at the top of the screen while the records are being processed. The **Download** button is not available *until all* selected records have been processed for download.

2. Use the drop-down menu to select the *type* of records you wish to view; either **All Records**, **BIB Record(s)** or **Authority Record(s)**.

   - The *default* selection is **All Records**.

3. If desired, click a title link for a record in the Download Cart to view the MARC display for the associated record.

   - The MARC display for the selected bibliographic record opens in an *additional* browser window.

To remove a *single* record from the cart:

- Click the 🗑 icon to the left of the record you wish to remove from the list.

  ○ The Download Cart refreshes with the selected record removed from the list.

Typical MARC Display

To remove *multiple records* from the cart:

> *Do not* empty the Download Cart until the records in the cart have been downloaded. Once the records are deleted, you must *reselect* the records if you wish to restore them to the cart.

1. Use the drop-down menu to select the *type* of records you wish to delete; either **All Records**, **BIB Record(s)** or **Authority Record(s)**.

   - The *default* selection is **All Records**.

2. Click the **Empty List** button on the Download Cart to remove all records of the *selected type* from the cart.

   - A confirmation dialog displays the message "Are you sure you want to delete all items in the list?"

3. Click the **OK** button to continue with the deletion. (Click the **Cancel** button to cancel the deletion and retain the current records in the Download Cart.).

   - The confirmation dialog closes, and the Download Cart refreshes and displays the message "No (*record type*) records in the Download List."

Downloading the Records File

> Records contained in the records file are sequenced in the *same order* in which they were added to the Download Cart.

To download the records file:

1. Display the Download Cart (see *Managing the Download Cart* on page **3-4** for details).

2. Use the drop-down menu to select the *type* of records you wish to delete; either **All Records**, **BIB Record(s)** or **Authority Record(s)**.

   - The *default* selection is **All Records**.

3. Click the **Download** button.

   - A File Download dialog displays.

4. Click the **Save** button on the File Download dialog.

   - A standard Save As dialog displays.

5. Enter a name for the file in the **File name** text box.
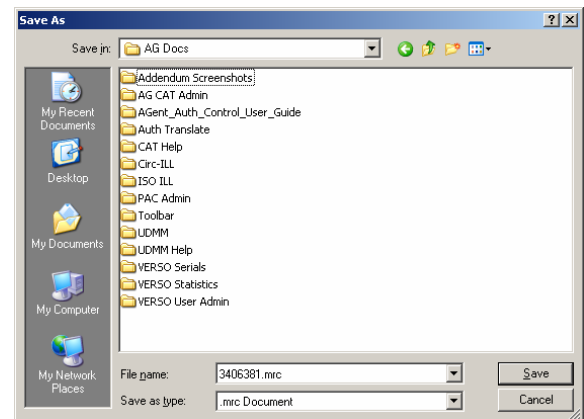
Save As Dialog

> Be sure to use the **.mrc** extension at the end of the file name.

6. Select the location in which you wish to save the record.

7. Click the **Save** button to download the records file.

   - Depending on your browser, a status dialog may display while the record is being downloaded. When the record has been downloaded, a "Download Complete" message displays. Click the **Close** button to close the status dialog.

8. Delete the downloaded records from the Download Cart (see *Managing the Download Cart* on page **3-4** for details).

THIS PAGE INTENTIONALLY LEFT BLANK